

INTERIM IRM PROCEDURAL UPDATE

DATE: 03/09/2010

NUMBER: WI-03-0310-0365

SUBJECT: Interim Procedural Update to IRM 3.42.7, e-help Desk

AFFECTED IRM(s)/SUBSECTION(s): 3.42.7

CHANGE(s):

IRM 3.42.7.2.5 - Compliance Check Tool – added new section.

IRM 3.42.7.4 - Introduction to the e-help Support System – updated procedures to gain initial access to EHSS, and to reset or unlock passwords.

IRM 3.42.7.5.2.2 - Problem Type – added note to Customer Comment;

IRM 3.42.7.5.2.3 - Description – added a caution to paragraph (2).

IRM 3.42.7.5.2.5 - Case Type – added a 10-digit PIN example under Product Question category.

IRM 3.42.7.5.3.2 - Search Solution Advisor – updated paragraph (1) to reflect that Solution Advisor uses the first 80 characters from the Summary field to populate the Search field.

IRM 3.42.7.5.3.7.1 - Reopened e-cases – updated chart and added (3).

IRM 3.42.7.5.5 - Reviewing the Worklist – added paragraph (6) regarding EPSS e-case Worklist Assignments.

IRM 3.42.7.5.6.1 - 990N e-Postcard E-mails – added new section.

IRM 3.42.7.5.6.3 - Procedures for Accessing and Creating e-mail – updated paragraph (4) , deleting several e-mail templates.

IRM 3.42.7.7.2.1 - Customer Complaints – updated paragraph (3) to show e-cases should be elevated to the lead and not the manager.

IRM 3.42.7.7.3 - Initial Greeting – added reminder to paragraph (6).

IRM 3.42.7.7.4.2 - Authentication/Authorization for e-file – updated Figure 3.42.7-38.

IRM 3.42.7.7.4.4.1 - Authentication of 990N E-Postcard – added new section.

IRM 3.42.7.7.5.1 - Transferring Calls – corrected extension for transferring caller to call control table in ACD. Updated Figure 3.42.7-43. Added paragraph (8).

Exhibit 3.42.7-3 - Overhead Programs – clarified OFP 990-59300 (use for Employee Satisfaction Survey) meetings. Deleted 990-59306.